DOCUMENT RESUME

ED 419 545 IR 057 048

TITLE	Combined School and Public Libraries: Guidelines for Decision Making. Second Edition. Bulletin No. 98234.
INSTITUTION	Wisconsin State Dept. of Public Instruction, Madison. Div. of Library Services.
PUB DATE	1998-05-00
NOTE	38p.
PUB TYPE	Guides - Non-Classroom (055) -- Reports - Evaluative (142)
EDRS PRICE	MF01/PC02 Plus Postage.
DESCRIPTORS	Elementary Secondary Education; Library Administration; Library Cooperation; Library Planning; Library Role; *Library Services; Mission Statements; *Public Libraries; *School Community Relationship; *School Libraries; *Shared Library Resources; *State Programs
IDENTIFIERS	School Public Library Cooperation; *Wisconsin

ABSTRACT

The Wisconsin Department of Public Instruction's Division for Libraries and Community Learning frequently receives requests for information on the legality and desirability of combining school and public libraries. The purpose of this publication is to help communities and school districts determine whether a combined school and public library will be the best way to provide the most efficient library service for all community residents. A combined school and public library is one that is located in a single facility and operates cooperatively to perform the curriculum support functions associated with a school library, as well as to provide the broader library service needs of children, young adults, and adults that are commonly the focus of the public library. Topics covered are: planning issues; mission statements; the legal framework for combined school-public libraries in the state of Wisconsin; and a list of key issues to be considered when examining the feasibility of establishing such a library. A feasibility checklist developed to help make a decision concerning library service is also included and covers planning, governance, administration and funding, access to information and materials, the physical facility, technology, and attitudinal factors. Included in the appendices are: descriptions of existing combined school and public libraries in Wisconsin; examples of alternative methods for improving library services; a selected bibliography; statutory references; and sample master agreement. (AEF)

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Combined School / Public Libraries

GUIDELINES FOR DECISION MAKING

Second Edition

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IR057048

Combined School and Public Libraries

Guidelines for Decision Making

Second Edition

Division for Libraries and Community Learning

Endorsed by the
Council on Library and Network Development

Wisconsin Department of Public Instruction

This publication is available from
Division for Libraries and Community Learning
Wisconsin Department of Public Instruction
P.O. Box 7841
Madison, Wisconsin 53707-7841
(608) 266-2205

Bulletin No. 98234

May 1998

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Printed on recycled paper

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Acknowledgments

The preparation and publication of this revision of *Combined School and Public Libraries: Guidelines for Decision Making* was made possible with the invaluable guidance and insights of the members of the Committee on Combined School and Public Libraries of the Council on Library and Network Development (COLAND):

Milton Mitchell, Chair
Richard F. Haas
Miriam Erickson
Timothy Laatsch
Pat La Violette

This revision is based largely on the work of an earlier COLAND Committee consisting of:

Richard F. Haas, Chair
Miriam Erickson
Timothy Laatsch
Pat La Violette
Bill Wilson

A debt of gratitude is also owed to the following individuals and publications for the guidance and information they conveyed: Shirley L. Aaron, *A Study of Combined School-Public Libraries*, ALA, 1980; *Evaluation of a Joint Venture in Rural Library Service*, 1992, prepared by Himmel & Wilson, Library Consultants, Madison, WI, for the Lincoln Trail Libraries System, Champaign, IL, Janice Beck Ison, Director.

Division for Libraries and Community Learning staff liaisons to the committee were Larry T. Nix, Public Library Development Team, (608) 266-7270, and Richard Sorensen, Instructional Media and Technology Team, (608) 266-1924. Donald Lamb, former Public Library Administration Consultant, also worked with both COLAND committees as a DLCL staff liaison. Thanks also to George Hall, Program Assistant for the Public Library Development Team, who did the final formatting and proofing of the publication.

Introduction

The Wisconsin Department of Public Instruction's Division for Libraries and Community Learning frequently receives requests for information on the legality and desirability of combining school and public libraries. Such libraries are located in a single facility, operating cooperatively to perform the curriculum support functions commonly associated with school library media programs and to provide the broader library service needs of children, young adults, and adults that are commonly the focus of public libraries.

Among the factors accounting for this interest is the pressure on all public institutions to use tax moneys responsibly. There is also broad acceptance in Wisconsin of the concept of community education, which envisions the school as the central institution for the education of all community members and encourages cooperation and coordination among educational agencies. In some instances, school library media centers are being urged to expand their programs as a means to demonstrate to the community more efficient utilization of existing educational facilities.

Although at first blush combining school and public libraries seems a logical and reasonable idea, there are significant obstacles to establishing libraries which are effective both as school libraries and as public libraries. One evidence of this is that there are only a handful of such libraries in Wisconsin or even in the nation. Another is that, although this possibility often arises, most communities reject this idea after study as not being feasible or desirable.

With those caveats, the purpose of this publication is to help communities and school districts determine whether such a combination will be the best way to provide effective school and public library service. The information and checklists found here should guide interested parties in making good decisions. The bibliography also lists selected items which provide additional information for those seeking increased understanding of the issues involved.

Local library personnel and community members may wish to seek technical assistance from their public library system and to contact the Division for Libraries and Community Learning in order to clarify the legal, governance, and funding consequences of a combined program.

A community may want to consider other alternatives to the combined school and public library for improving library service. Technology presents a significant opportunity for libraries of all types to share resources effectively and to gain increased access to information without combining facilities.

If a combined facility appears to be the best way to provide good library services to all concerned, a section of this publication provides guidance on how to implement this concept in the most effective manner and in compliance with legal requirements.

Sources of Help

At the state level, staff from the Instructional Media and Technology Team of the Department of Public Instruction can assist school districts in dealing with the issue of combined school and public libraries, and staff from the Public Library Development Team can assist municipalities and public libraries. Municipalities and public libraries should also seek assistance from the public library system in whose area they are located.

Legal Basis

Wisconsin statutes do not accommodate a truly combined library, where a single board of control has responsibility for both school and public library services. However, while there is no legal entity in Wisconsin called a combined school and public library, there are legal mechanisms for jointly providing school and public library services in a shared facility. In this document, the term "combined library" generally refers to a school and public library, each with its own board, operating cooperatively within a single facility, sharing staff and/or resources, and offering some services on a shared basis.

An alternative arrangement could occur in an instance where a school district contracts with a public library board and the governing body of the municipality or county to administer the school library media program as part of a branch library. However, the combined library would still need to comply with all applicable administrative rules and statutes relating to the operation of a school library media center.

See Appendix D for specific legal citations.

Planning

Planning for public and school library services should take place within the context of planning for total community services. Planning is an essential ingredient in the development and improvement of all of today's libraries. For more than a decade, libraries have been encouraged to examine the communities they serve, to identify the needs of those individual communities, and to develop a strategy—a plan—for providing services that will meet those needs. In addition, school districts are required by administrative rule to have a current long-range plan for library services. Tools such as the Department of Public Instruction's *School Library Media Programs: A Resource and Planning Guide* (Madison: DPI, 1987) and the Public Library Association's *Planning for Results: A Library Transformation Process* (Chicago: ALA, 1998) can assist libraries and governing agencies with assessing local needs and creating a plan for service. *Wisconsin Public Library Standards* (Madison: DPI, 1994) makes broad recommendations regarding service goals for public libraries across the state but also strongly encourages individual libraries to examine their particular local needs and to develop a plan to meet those needs.

Good planning recognizes the unique situations and challenges faced by each individual library and school district. Similarities may exist among libraries in a certain geographic area or among libraries serving a certain population range, but these shared characteristics are not an unfailing guarantee that any two libraries' service needs will be comparable. The most meaningful program of service is one that results from an examination of the particular library needs of a specific community.

Good planning also recognizes the fact that libraries of all types operate and evolve in a political environment. The needs-assessment process can help library planners better understand the elements in that environment. And a better understanding of the library's political setting will help the library advance its cause. These premises and considerations regarding the value of planning apply to all types of libraries—public, school, academic, or special.

Missions

School Library Media Programs

The mission of the school library media program is to support the curriculum and ensure that students and staff are effective users of ideas and information. This mission is accomplished by library media specialists as they:

- Build, in collaboration with classroom teachers, a collection of materials that reflects the school curriculum, the varied modes of teaching and learning, and the interests of students.
- Develop an information literacy curriculum in collaboration with teachers.
- Plan lessons with teachers that include a wide range of resources and technology.
- Teach student groups ranging in size from a few individuals to multi-class groups.
- Coordinate the school's use of information technology, and in many instances also coordinate instructional technology.

The Public Library

The mission of the public library is to identify, select, organize, retrieve, disseminate, and make accessible the entire spectrum of knowledge in order to support the informational, educational, and recreational needs of its clientele. This mission is accomplished by providing free access to collections, resources, and services that help patrons of all ages and all cultural and ethnic backgrounds obtain information relating to their personal, educational, and professional needs. While the public library considers the entire spectrum of knowledge to be its purview and the entire community as its user population, it may emphasize services in support of popular materials; formal education; independent, self-directed learning; reference; research; community information; preschoolers' services; and community programming and activities.

Issues to be Considered

The following is a list of issues identified by various studies that should be considered when examining the feasibility of establishing a combined school and public library.

1. School district boundaries and city or village boundaries are usually not identical. This fact raises questions about who is eligible to use the library and how much support each entity is expected to provide.

2. Salaries are usually much higher for school librarians.

3. Certification differs for school and public librarians, with a master's degree (or the equivalent) and a teaching license required of the school librarian, while the qualifications for public librarian certification vary depending on population.

4. The mission of the school library is to support teaching and learning for school age children; the mission of the public library is to meet the information needs of all members of the community. In practice, many public libraries in small communities place a high priority on children and adult recreational reading. The collection(s) must take both missions into consideration.

5. Libraries generally allow unrestricted access to all available materials for all age groups. However, policies of school and public libraries related to access to materials may be significantly different and would need to be reconciled. Public library materials are selected to appeal to a wide range of interests and ages. The materials in school library collections are carefully selected to match the curriculum and the learning needs and maturity level of the students they serve.

6. Two separate governing agents are required for a combined library. A legally constituted public library requires a board of trustees separate from the school board. All decisions regarding policies and operation affect both school and public service aspects. Consequently,

    - board members must be aware of how decisions will affect both user groups and both administrative structures;

    - boards or their representatives must meet together regularly; and

    - when staff are shared, the two boards or their administrators will occasionally have conflicting opinions about priorities and responsibilities.

7. As with any enterprise, success depends on the perceptions, attitudes, and reactions of potential users. Some adults may not be comfortable in the presence of teenagers or in an environment that favors them. Students may not be eager to return to school

after hours, and students from another school might be uncomfortable in a school building other than "their" school.

8. Ideal locations for school and public libraries conflict. A public library should be in the most active area of the community, near businesses, and easily entered with adequate parking adjacent; whereas the school library media center should be as close as possible to classrooms, and the school should be away from the busiest area of the community.

9. Public libraries often receive substantial private donations for a new building or an addition, for starting a new service, or for upgrading an existing collection. Donors may or may not be as likely to give to a public library that is seen as part of a school district.

10. The environments of school and public libraries differ, with the school requiring guidance and group supervision, and the public library emphasizing independence and patron privacy. Activities such as instruction for students, conversation, and special programs for adults may conflict.

11. Easy access for adults sometimes causes a security problem for schools or a concern for children's safety.

12. The cost of a combined library is not so small as the sharing of space and facilities would make it seem. For example, adults or preschoolers and school children usually want to use the library at the same time, rather than at different and complementary times. This affects the total space needed, as well as staff, furniture, equipment, and resources. In addition, a public library needs to be open on evenings and weekends and during vacation periods.

13. Daily policy or procedural decisions can be a source of conflict. Will the English class use all the terminals, or will some be reserved for adults?

14. Conflicts are bound to arise over priorities given to the many aspects of library service. Examples include content of the collection, hours of operation, programming, space, and access to such things as seating, equipment, resources, the public catalog, and reference service.

15. In the event of the dissolution of the combination and the establishment of separate libraries, decisions will have to be made as to how to divide the various components (collection, furniture, equipment, software, etc.).

Alternatives for Improving Library Services Without Combining School and Public Libraries

A community examining the feasibility of establishing a combined school and public library should examine alternative governance options, such as larger units of service, for improving library services, as well as cooperative arrangements and the use of electronic technology.

Improving school and public library services through technology and cooperation

By using computers and telecommunications technology, libraries have made it possible for people to receive some elements of library service without actually going to a specific library.

Direct Access to Electronic media

While access to printed materials remains an essential component of library service, more and more information is being made available in an electronic or digital format. This information includes periodical and newspaper indexes, full-text periodical and newspaper articles, and standard reference tools, including encyclopedias. Licenses can be purchased for access to these information sources which allow joint use by both school and public library users through the Internet. Electronic information can be made available to library users in the library, from their home, or from work or school. Licenses can be purchased for access to electronic information databases on a local, regional, or statewide basis.

Online Catalog

If a library makes its holdings accessible through an electronic catalog and provides for outside access, patrons can search the catalog from their home or office computers.

WISCAT

This statewide master catalog provides author, title, subject and keyword access to more than five million titles found in Wisconsin libraries. Virtually all academic and public libraries and 36% of the 1734 school library media centers in Wisconsin have listed their holdings in this comprehensive access tool.

Improving public library services and support through larger units of service

If the purpose of considering a combined school and public library is to improve the quality and availability of library service, it may be possible to create a stronger library by enlarging its base of users through technology, electronic access, delivery systems, and joint operating agreements than by adding the public library mission to a school library media program. If the purpose is to improve tax equity, this can be accomplished through larger units of public library service and through increased county support.

Joint public libraries, county library services, and consolidated county libraries are some of the structures already developed in Wisconsin to permit small libraries to take advantage of larger units of service.

Consideration of larger units of public library service also requires careful planning and study.

Joint County, City, Village, and Town Public Libraries

A joint public library may be created by any two or more contiguous municipalities or by a county and one or more municipalities located in whole or in part in the county by appropriate agreement of their governing bodies. A town desiring to participate in a joint library must obtain the approval of the county library board, if one exists, and the county board of supervisors before final action is taken. A joint library must include at least one municipality with a public library established before May 8, 1990.

A joint public library is administered by a library board consisting of seven to eleven members representative of the populations of the participating municipalities and has the same powers as a municipal library board. Board members are appointed by the head of the municipal governing body of each participating municipality. Joint libraries may own and operate physical facilities jointly or individually. The respective share of operating costs is determined at the time the joint library agreement is written. Costs may be apportioned based on populations served or some other factor such as level of use. Each municipality participating in a joint library agreement levies a tax to support its share of costs. One municipal party to the joint library agreement, usually the largest, agrees to provide municipal administrative services such as serving as the depository of tax funds, personnel administration, and bill paying.

Some communities that participate in joint public libraries in Wisconsin are listed in Appendix B.

County Library Services

A county board may establish a county library service to provide public library service to the residents of the county who do not live in communities that have established libraries and/or to improve the library services provided by community libraries. A county library service may operate a library, provide services such as a bookmobile and interlibrary loan and/or contract with other library organizations for services.

A county library service is administered by a seven-member library board appointed by the county board chairperson or county executive and functions as an agency of the county. The board must include at least one school district administrator (or the district administrator's representative), one or two county board supervisors, representatives of existing library boards, and persons residing in municipalities not served by a library. A county library service board has the same powers as a municipal library board. County library services are funded by a library tax on all property not exempted from the county library tax under s. 43.64, Wis. Stats.

Counties that have county library services are listed in Appendix B.

Consolidated County Libraries

A county board of supervisors may establish a consolidated public library and may acquire any libraries already established by consent of the authorities controlling those libraries. A consolidated county library is administered by a seven or nine member library board appointed by the county board chairperson or county executive and functions as an agency of the county. The library board must include at least one school district administrator (or the district administrator's representative) and one or two county board supervisors. The consolidated county library board has the same powers as a municipal library board. A uniform county library tax is applied on all of the taxable property of the county.

Counties that have established consolidated county libraries are listed in Appendix B.

Improving library services to the community through expanded access to the school

While it does not amount to a substitute for public library services, a school district can choose to open its library media centers, with their collections and other information services, to the general public. Most public schools will allow adults to use the library materials and media centers as long as this use does not interfere with teaching and learning or the safety and comfort of the students. Some middle and high schools open their library media centers evenings, weekends, and during vacations to enable students and adults to use the resources outside the school day. Some elementary schools encourage parents to bring their preschoolers into the library media center to introduce them to the books and other resources there. Some have established parent resource centers in connection with the school library media center. Examples of these alternatives can be found in Appendix B.

Feasibility Checklist

The checklist which follows was developed to help community members, working with professional library personnel, decide whether separate school and public libraries, a combined school and public library, or some other alternative will offer the best library services in their particular locality *(Statements that reflect statutory requirements are indicated with an asterisk [*] and must be checked "Yes.")*

Planning

Yes No

1. ☐ ☐ Mission statements for both the public library and the school library media programs are clearly understood and supported by all parties. Further, there is an understanding of how these missions coincide and how they differ and how they will be carried out.

Yes No

2. ☐ ☐ There is knowledge of any existing planning documents for the public library and school library media programs, and agreement on how these documents can be integrated and priorities established.

Yes No

3. ☐ ☐ A preliminary study of the feasibility and suitability of the combined library program for the community has been conducted, including the review of alternatives to establishing a combined library.

Yes No

4. ☐ ☐ Concerned groups have examined carefully the complementary role of the school and public libraries and are aware of the range of services and resources which must be offered to meet the needs of both user populations.

Yes No

5. ☐ ☐ Community members are involved in and are supportive of the decision to have a combined school and public library program.

Yes No

6. ☐ ☐ The jurisdictional boundaries of the school district and the public library area are identical or nearly so.

Yes No

7. ☐ ☐ The two boards which are to govern different parts of the combined program have defined their responsibilities in a formal agreement drawn up during the planning phase.

Yes No

8. ☐ ☐ The issue of dissolving the combination has been discussed and all parties agree on how assets will be divided.

Governance

Public Library

Yes No

9. ☐ ☐ *The public library program will be established in accordance with Chapter 43, Wis. Stats.

Yes No

10. ☐ ☐ *A legally appointed and constituted public library board will govern the operation of the public library program.

Yes No

11. ☐ ☐ *The public library board will have exclusive control of the expenditure of all moneys collected, donated, or appropriated for the public library fund.

Yes No

12. ☐ ☐ *The public library board will employ a library director who is qualified and maintains the appropriate level of certification under the provisions stated in the *Wisconsin Administrative Code.*

School Library Media Services

Yes No

13. ☐ ☐ *The district has a written long-range plan for library services which was formulated by teachers, library and audiovisual personnel, and administrators and was approved by the school district board.

Yes No

14. ☐ ☐ *Appropriately licensed library media personnel provide or supervise the services of the school library media program in accordance with the provisions stated in the *Wisconsin Administrative Code.*

Public Library / School Library Media Services

Yes No

15. ☐ ☐ A head librarian certified as both a public librarian and a school library media specialist will be hired by the two boards and delegated active management of the library.

Yes No

16. ☐ ☐ The salaries and benefits of all employees will be similar, based on comparable qualifications and job expectations.

Administration and Funding

Yes No

17. ☐ ☐ General procedures for operating the combined library have been discussed, and all parties agree on principal elements, such as hours of operation, responsibility for expenses, access to resources and activities, user rights and responsibilities, and authority for daily decision making.

Yes No

18. ☐ ☐ The public library will be a member of a public library system and actively participate in its programs of service, including reciprocal borrower's privileges and interlibrary loans.

Yes No

19. ☐ ☐ *The public library board will follow statutory requirements as to fiscal year, audits, budgeting process, and annual reports to the municipal governing authority and the Division for Libraries and Community Learning.

Access to Information And Materials

Yes No

20. ☐ ☐ The library will be open to the public the recommended number of hours for its population group according to *Wisconsin Public Library Standards*.

Yes No

21. ☐ ☐ A collection-development policy consistent with the mission statements has been developed to guide selection of material for both school and public library clientele.

Yes No

22. ☐ ☐ The issue of access to material for all age groups and maturity levels has been discussed in detail and is thoroughly understood by all parties, and a process for allowing users access to resources has been decided and is supported by all parties.

Yes No

23. ☐ ☐ An acceptable use policy on Internet access consistent with the mission statements of the school and public library has been developed and is supported by all parties.

The Physical Facility

Yes No

24. ☐ ☐ *The building that will house the proposed combined school and public library is in compliance with the provisions of Title II of the Americans with Disabilities Act (ADA).

Yes No

25. ☐ ☐ The building is easily accessible to the public and to students and teachers. There is an entrance directly into the library from the outside at ground floor (entry at grade without steps or ramp).

Yes No

26. ☐ ☐ The building design permits nearby parking for library users (within 200–500 feet from library entrance) as well as easy access to the library from classrooms.

Yes No

27. ☐ ☐ The building provides adequate space to implement the full range of library services consistent with the library's comprehensive long-range plan, *Wisconsin Public Library Standards*, and the recommended space needs outlined in the DPI publication *School Library Media Programs: A Resource and Planning Guide*.

Technology

Yes No

28. ☐ ☐ There is agreement on how equipment, software and other aspects of technology will be purchased or licensed and how access will be provided to students, school staff, and the public.

Attitudinal Factors

Yes No

29. ☐ ☐ Decision makers and key individuals (administrators and employees) are genuinely enthusiastic about the project and dedicated to making it work, despite inevitable difficulties.

Yes No

30. ☐ ☐ Improving service, rather than saving money, is the overriding concern in planning a combined library.

Yes No

31. ☐ ☐ The concerned groups in the community realize that a combined library program is not necessarily a more economical means of offering adequate library services to both students and community members than school and public programs in separate facilities would be.

Yes No

32. ☐ ☐ Adults (not only parents of students) feel comfortable and welcome in the school building (or other site of the combined library) and are accustomed to using it for public functions.

Yes No

33. ☐ ☐ The mixing of preschoolers, children, teenagers, and young and older adults is not seen as threatening or uncomfortable by any of the potential users or the responsible agencies.

34. The combined library provides the best opportunity for your community to obtain the following:

Yes No

a. ☐ ☐ Professional library personnel with a specialization in school librarianship.

Yes No

b. ☐ ☐ Professional library personnel with a specialization in public librarianship where no such position previously existed.

Yes No

c. ☐ ☐ A means for strengthening available material resources.

Yes No

d. ☐ ☐ An adequately planned program of services to meet the needs of both public and school-based users.

Establishment of a Combined School and Public Library

This section is to be used after a community has undertaken a responsible decision making process and decided to create a combined library. This section contains procedures which will help a community to meet the legal and practical requirements for creating a combined school and public library in Wisconsin. Publication of this information in no way implies endorsement of the combined library concept. It merely recognizes that combined libraries are a reality, and is intended to help people interested in creating one to meet statutory requirements and to optimize the library's potential for success.

What is a Combined Library?

As used in this document, the term *combined library* means an entity which meets the legal requirements to function both as a school library and as a public library and provides its services from a single facility. As noted earlier in this document, Wisconsin law does not accommodate a truly combined library with a single governing body. A combined library in Wisconsin must meet the relevant statutory requirements for operating both types of libraries contained in the combination. This means that some of the streamlining that people hope will result from a combination may not occur.

The cost efficiencies associated with combined libraries are primarily in the area of capital costs. One building is cheaper to construct and operate than two buildings. One set of office equipment is less costly to purchase and maintain than two sets. However, the requirement to have properly certified staff for both types of library means that the opportunities for cost efficiencies related to staffing are not what some people would expect. Collection dissimilarities make cost savings there less than might be anticipated.

Getting Started

Librarians are a major source of information on how to set up the library properly. Early in the planning process, planners should involve the librarians who will be expected to work in the combined library. Also, before doing anything of a formal nature, they should contact the administrator of the public library system in which the community is located and the staff at the Wisconsin Division for Libraries and Community Learning (DLCL). Working with these agencies will save time up front and save headaches later.

Interested Parties

Three parties will have a beginning-to-end interest in the operation of the combined library. They are the public library board of trustees, the school board, and the municipal governing body. Each has a specific role related to library or instructional matters defined in the statutes. The creation of a combined library means that the roles will be played out in a special situation. There is

nothing in the creation of a combined library which alters the role or responsibilities defined for each party in the statutes. In Wisconsin statutes, the municipal governing body has less authority over library operation than the library board. For planning purposes, however, it is probably simplest to treat the three parties as co-equals.

Basic Considerations

Parties involved in a combined library have long-term interests which must be protected by a carefully written master agreement. The agreement should be buttressed by a series of well written policies which cover operational matters. The content of the master agreement should be outlined by a committee made up of members of the school board, the public library board, and the municipal governing body. Then it should be put into legal form by an attorney. It cannot be overemphasized how essential this agreement is to the long-term success of this enterprise. It is important to take the necessary time to do it right. Drafts should be sent to the library system administrator and the DLCL advisor for their comment.

There can be a temptation to place more in the master agreement than is wise. In the paragraphs below, matters to cover in the agreement are listed separately from matters which should be treated in policies. The master agreement should deal with the fundamentals of governance, staffing, funding, ownership, and termination of the agreement.

Other matters which must be committed to writing can be handled through policies. Asking two questions will help to determine whether a point should be a part of the master agreement or of a policy manual: Is this of overriding importance? And, Is this likely to be changed during the time frame of the agreement? Yes to the first and No to the second suggests the matter is a good candidate to be placed in the master agreement.

The successful operation of a combined library depends on doing a number of things right. In the grand scheme of things, however, some are more important than others. Some are less likely than others to change with any frequency. Below are a number of items to deal with in order to set up and manage the combined library properly. They are grouped according to whether they belong in the master agreement or whether they should be the subject of policy statements.

The Master Agreement

1. *Governance*. The master agreement should list the parties entering into the agreement and cite the statutory authority for entering into an agreement of this sort. Ordinarily the parties to the agreement should be the school board, the library board, and the municipal governing body. It is essential to understand that the village board or city council may not act on behalf of the library board unless authorized by the library board to do so.

   The agreement should also cite the statutes under which the parties will operate the library.

2. *Staffing*. Because a combined library is two libraries sharing one facility, statutory staffing requirements for both types of libraries must be met. Appropriately licensed school personnel must be working during the school day. Appropriately certified public library personnel must be working when the facility is functioning primarily as a public library. The intention to meet statutory staffing requirements should be stated in the agreement.

3. *Funding*. It is important to determine and put into the master agreement the financial responsibilities of each party. This includes both capital and operational costs.

4. *Ownership of assets*. The agreement should clarify the ownership of assets brought into the shared library (such as equipment, collection, etc.) and how ownership will be determined in the event of termination of the combined library agreement.

5. *Physical plant*. The agreement should state the requirements that must be met by the party providing the physical facility for the combined library. This can include the library's location in the building, public access to the library, maintenance, and more.

6. *Termination of the agreement*. The agreement should state the conditions related to termination of the agreement.

Policies and Practices

1. *General policies*. Since the missions of a school library and a public library are fundamentally different, the policies and procedures under which they operate will be different. It is very important that each library have in place clear policies which deal with important library functions such as collection development, meeting room use, Internet access, and handling disruptive patrons.

2. *Special policies*. A combined library will require some policies to cover matters unique to such a library. For example, a policy may be needed to cover the circumstance when an expelled student wants to use the public library. Or a policy may be needed related to the effect on operations when one of the parties observes a holiday or an in-service day.

3. *Advisory Committee*. Problems which need resolving will arise from the combined library. There should be a standing committee of members of the boards and library staff to review problems and make recommendations to the boards for resolving them.

4. *Personnel*. Each board will hire its personnel and establish the policies related to their compensation and performance. A combined library provides the potential of having one director with dual certification as the top manager of the library. Policy language should cover that possibility and its implications.

5. *Public parking and entrance.* If the library is part of a school building, it will need to be located where the public library patrons can access it directly from an outside parking lot. This will encourage adult usage of the library during the day and reduce distractions during instruction. A policy should clarify who may park where.

6. *Staff involvement.* Staff should have a significant voice both in planning the combined library and in its operation. Involving them will reduce problems after startup, and personnel will be more supportive of the idea than they otherwise might be.

Assessing the Success of the Combined Library

Assessing the success of the combined library requires comparing before-and-after information. This includes cost, usage, and survey information. While still in the planning stage of creating the library, information should be assembled which can be used after the combined library is in operation. This includes circulation figures for both libraries, program attendance, library visits, and operating costs. A before-and-after community survey can tell much about the success of the operation and about which premerger assumptions were valid.

If the postmerger data is disappointing, the parties involved should analyze it and, if appropriate, use it to make adjustments to the operation.

Some Final Advice

Patience is necessary. There may be initial personal and professional obstacles to a smooth merger, but time will be an important ally.

Appendix A: Combined School and Public Libraries in Wisconsin

None of the libraries described here is combined in the sense that it has a single board of control. With the exception of Washington Island, they consist of a school library and a public library, each with its own board, sharing the same space and sometimes part of a single individual's time. The public library program of the Birnamwood library functions as a branch of the Shawano City-County Library; the library on Washington Island is a branch of the Door County Library. The following information has been provided by the listed libraries.

Birnamwood

The combined school and public library opened in 1977 after a $90,000 donation from local resident Minnie Prahl. This gift encouraged the district to match the gift and construct a library facility for the school and community to use jointly. In 1997, the school district doubled the size of the facility to meet the needs of both students and the public, creating a 6,000 square foot library. It houses a collection of approximately 20,000 items, which are intershelved with the exception of the adult fiction.

The library is a branch of the Shawano City-County library and a member of the Nicolet Federated Library System. The Birnamwood public library board consists of 7 members who work together with the Birnamwood Village Board and Wittenberg-Birnamwood School District Board to administer policies and procedures. The library is staffed by the school district media specialist and a public library aide who works 20 hours per week, which allows for evening, weekend, holiday and summer usage. Public library telephone number: (715) 449-3120.

Durand

The Durand Community Library opened in July 1996. The combined library is located in the new addition to Durand High School. The combined library is the result of merging the existing public library and the existing high school library to meet needs for improved facilities for both libraries.

The joint community library has enhanced both the public and high school reference resources as well as leisure reading materials. In addition, the public has access to the computer network of the high school, which allows access to the Internet for the community as well as students and teachers. The library hours have been expanded for both students and community.

Staffing for the library is provided jointly by the city and the school district. The city provides one state certified public librarian as well as one assistant. The city also provides a student library aide. The school district provides one state certified library media specialist as well as one library aide and student volunteers as necessary. The school district provides custodial and maintenance services for the facility. Public library telephone number: (715) 672-8730.

Florence

The Florence County Library serves a county population of 4,590. The Florence School District Building houses the joint use library and serves both school and public clienteles. The library is a member of the Nicolet Federated Library System. The school board and county library board have a cooperative agreement to provide library services in the high school / elementary school library. School staff consists of one certified school library media specialist and an aide. The county provides a part-time grade II certified librarian and a part-time assistant. School employees report to the Board of Education, and county employees report to the County Library Board of Trustees. The two librarians do their own collection development, but with collaboration.

The library has county and school open hours. When school dismisses for the day, the county library opens to avoid disruption of services and also has Saturday open hours. During summer open hours, an additional two hours a week are used for the summer reading program.

Both libraries share the cost of the OWLSNET Automation System, which is supported by the Nicolet Federated Library System. Participation in this system includes twice-a-week interloan delivery and holds placed by patrons from their home computers. Public library telephone number: (715) 528-3094.

Kohler

Kohler Public Library is a popular materials center for the Village of Kohler. The public library collection is housed in the Kohler Area School District Building. The school building is the site of the elementary, middle and high school. The public library shares facilities with the elementary and the high school libraries. The public library provides books, magazines, videos, audio books and computer CD-ROM programs to the children and adults of the Village. The Library is open Monday through Thursday from morning through evening, Friday morning and afternoon, and Sunday afternoon. Special programs are held throughout the year, including an extensive summer reading program. Kohler Public Library shares technology with the school to provide greater service to the public and school populations. The combined school and public library provides an online catalog, CD work stations, Infotrak, SIRS, and unlimited Internet service, including email. Kohler Public Library endeavors to provide a full range of library service with a friendly, small-town ambiance. Public library telephone number: (920) 459-2923.

Laona

A combined library program has existed in this small northeastern Wisconsin lumbering town since 1918. In March of 1987, after a fire destroyed the high school, the combined library reopened in a new high school addition to the original elementary school building.

In addition to a main area about four classrooms in size, the new library contains a meeting room and a children's room. In the main area, adult fiction and nonfiction and young adult nonfiction are intershelved and housed along with reference books, periodicals, and audiovisual software. The catalog also interfiles young adult and adult titles. The children's room houses both young adult and children's fiction and children's nonfiction. All reading areas are designed to minimize distractions from motion and conversation.

The library is five blocks from the Laona business district. A public librarian and school library media specialist are on duty from 8:00 a.m. until 3:00 p.m. through the week, with the public library staying open until 5:00 p.m. on Fridays. During the summer, only the public librarian is available, from 9:00 a.m. to 3:00 p.m.

Costs are split, with the district picking up utilities and the town paying for telephone and some other minor costs. The two librarians do their own collection development but work together on ordering, processing, and other functions to avoid unintentional duplication and to achieve efficiencies where possible. The library is affiliated with the Wisconsin Valley Library Service, which makes system services available to all residents. The board of trustees and the board of education meet at least once a year to go over policies and address any matters of concern. Library telephone number: (715) 674-4751.

Washington Island

A reversal of the typical pattern, the public library provides the school library media services on the island. Because of its size and remoteness, the Washington Island School District is not required to meet the educational standards to the same degree as other districts. The new Washington Island school, completed in 1986, has no library media center but shares a parking lot with the Washington Island Branch of the Door County Public Library. Students in grades K–6 visit the public library once a week as whole classes to exchange books, and middle and high school students come occasionally (three or four times a year) for special projects. No library media skills are taught as part of these visits, and the collection of materials is oriented to public library needs. Library telephone number: (920) 847-2323.

Appendix B: Examples of Alternative Methods for Improving Library Services

Larger units of public library service

Some joint public libraries

Albany (village/town)
Arpin (village/town)
Bruce (village/towns)
Cedarburg (city/town)
Eagle River (village/towns)
Glendale / North Shore (city/villages)
Kimberly / Little Chute (villages)
Ladysmith (city/county)
Mequon (city/village)
Random Lake (villages/towns)
Rhinelander (city/towns)
Salem (villages/towns)
Shawano (city/county)

County library services

Barron
Dane
Dodge
La Crosse (serves all of the county except the City of La Crosse)
Pierce
Polk

Consolidated county libraries

Adams
Brown
Door
Florence
Marathon
Marinette
Portage (serves all of the county except the Village of Amherst)

Schools promoting access to school libraries

Most public schools will allow adults to use the library materials and centers as long as this use does not interfere with teaching and learning or the safety and comfort of the students. Appleton

School District's circulation system is set up to allow any member of the community to borrow items. Rosholt School District publishes a notice in the district newsletter inviting residents to use the school libraries and borrow print materials. The Brodhead Middle School library media center is open to the community for two hours one afternoon a week to use the computer lab and to check out materials. Parents of preschoolers, home schooling parents, and other parents and grandparents receive a patron number upon request to use the library at Stoughton's Fox Prairie Elementary School. Often, providing access to library media services is seen as part of a school district's collaborative effort to provide day care, senior citizens activities, and other services. Pulaski School District offers a broad range of services through its schools.

Schools with extended hours

Some middle and high schools open their library media centers evenings, weekends, and during vacations to enable students and adults to use the resources outside the school day. The Maple School District makes its library media center computer facilities available to the public after hours. The Columbus School District employs an aide from 4:00–8:00 p.m., Monday through Thursday, who rotates between the high school and middle school so that the school district resources, including the Middle School technology lab, can be used by the community after school.

Schools with early childhood services

Some elementary schools, such as the Kettle Moraine District's Cushing School, encourage parents to bring their preschoolers into the library media center to introduce them to the books and other resources. Some have established parent resource centers in connection with the school library media center. Stoughton elementary schools hold Family Reading Nights at each elementary school, where children and parents or other responsible adults can use computers, read, and check out materials.

Appendix C: A Selected Bibliography

Legal References and Planning Guides

Planning for Results: A Library Transformation Process. Chicago, IL: American Library Association, 1998.

School District Standards and Rules.
- Wisconsin Statutes. Chapter 118, Chapter 121
- Wisconsin Administrative Code. Chapter PI 8, 18, 25, 26

School Library Media Programs: A Resource and Planning Guide. Madison, WI: Wisconsin Department of Public Instruction, 1987, reprinted 1991.

Wisconsin Public Library Standards. Madison, WI: Wisconsin Department of Public Instruction, 1994.

Wisconsin Statutes, Chapter 43.

Studies of Combined School and Public Libraries

Aaron, Shirley L. *A Study of the Combined School-Public Library.* Chicago, IL: American Association of School Librarians, American Library Association, 1980.

> "...it is unlikely that a community able to support or now supporting separate types of libraries will offer better school and public library service through a combined program, because the combination of factors required to promote a successful combined program seldom occurs...there is no documented evidence that economy results from the combination organizational pattern."

Amey, L.J. "Success in the Outback: The Case of School-Housed Public Libraries." *School Library Journal,* 36 (March 1989), pp. 109-14.

> "Some of the most vibrant, most community-oriented, most enthusiastically supported libraries that I have ever encountered have been school-housed public libraries."

Call, I.S. "Joint Use Libraries: Just How Good Are They?" *College and Research Libraries News,* 54 (November, 1993), pp.551-552.

Fairlie, David W. *Considering a Combined School Public Library.* Akron, NY: East Hill Foundation, 1995.

Extensive recent study with an up-to-date annotated bibliography.

Graham, Mae, and J. Maurice Travillian. "Merged Facilities: Potential and Constraints," in Jane Anne Hannigan and Glenn E. Estes, comp. and ed., *Media Center Facilities Design*, pp. 97-102. Chicago, IL: American Library Association, 1987.

"If there are examples of positive evaluations of an on-going and authentic library/media center serving with equal satisfaction the public library patron and the public school student, they have escaped the attention of these writers...[we] believe that an honest merged facility catering equally to the needs of all is possible but not probable. Too many factors—physical, financial, political, psychological—militate against it."

Haycock, Ken. "The School-Housed Public Library." *Emergency Librarian*, March-April 1990.

Haycock cites a number of criteria as possible predictors of success: clarify the role and function of each of the institutions; plan in advance; site the library as a focal point in the community; choose personnel carefully; fund the venture appropriately ("Successful cooperative ventures rarely save operating costs but can improve service; indeed, communities often have to pay more for the same level of service in a joint facility"); develop the collection for users of all ages; continuously evaluate the venture.

Jaffe, Lawrence Lewis. "Collection Development and Resource Sharing in the Combined School/Public Library." *Collection Management*, 7 (Fall 1985–Winter 1986), pp. 205-15.

"Libraries employing a combined structure have usually received negative treatment in library literature with recommendations to abandon such service agreements....It is the purpose of this article to relate findings concerning collection development and resource sharing without promoting or discouraging the use of the combined concept."

Olson, Renee. "2 in 1: Designing a Combined Library That Works for Everybody." *School Library Journal*, (February 1996), pp. 24-27.

Turnbull, Patricia. "School/Public Library Cooperation." *Illinois Libraries*, Vol. 73, No. 1 (January 1991), pp. 69-74.

"The subject of combined school/public libraries has generated many controversial articles in the professional literature and it is an undisputed fact that not all communities possess the optimal conditions for a successful joint library project...it was the intent of this investigation to identify major studies that examined the potential of combined systems—cooperative activities, advantages and disadvantages, and terms of formal agreement or major barriers....The decision to establish a combined library facility should not be based on a desire to save money in the areas of personnel, materials, or space but rather on the improvement of community library service."

Woolard, Wilma Lee Broughton. *Combined School/Public Libraries: A Survey With Conclusions and Recommendations*. New York, NY: Scarecrow Press, 1980.

"Despite opposition in some quarters to the development of combined school/public libraries, today's languishing economy will require school districts and communities to examine the concept with more openness than in the past. The number of successful combined libraries in operation and the body of literature and practical experience upon which to draw should ensure that the future will see the combined school/public library as a more viable institution in the extension of library services to people of all ages in the United States. Those who are willing to accept the challenge to innovate and try new or different approaches may find the results to be highly beneficial for all who are concerned with school and public library facilities at the local level."

Appendix D: Statutory References

School Library Media Services

To qualify for state aid, public school districts must meet the standards under s. 121.01, Wis. Stats. Section 121.02(h), or standard "h," requires that a school district:

> Provide adequate instructional materials, texts and library services which reflect the cultural diversity and pluralistic nature of American society.

Standard "h" is further explained in PI 8.01(2)(h) of the Wisconsin Administrative Code, which requires each school district board to:

1. Have on file a written, long-range plan for library services development which has been formulated by teachers, library and audiovisual personnel, and administrators and approved by the school district board.

2. Designate a licensed library media person to direct and coordinate the district's library media program.

3. Provide library facilities within the school building and make available to all pupils a current, balanced collection of books, basic reference materials, texts, periodicals, and audiovisual materials which depict in an accurate and unbiased way the cultural diversity and pluralistic nature of American society.

4. Provide library media services to all pupils as follows: to pupils in grades kindergarten through 6, library media services which are performed by or under the direction of licensed library and audiovisual personnel; and to pupils in grades 7 through 12, library media services which are performed by licensed library and audiovisual personnel.

Legally Established Public Libraries

Municipalities and counties have no legal obligations to provide public library service to their residents. However, 381 cities, villages, towns, and counties in Wisconsin have assumed this responsibility to varying degrees, and since the enactment of the public library system law in 1971, public library service has been made available statewide.

Public libraries must be established under the appropriate provisions of Chapter 43 of the Wisconsin statutes. Statutes stipulate that:

1. Wisconsin public libraries must be administered by a library board appointed by the chief administrative officer of the funding municipality with the approval of the municipal governing body. One of the members of the library board must be a school

district administrator or the administrator's representative, to represent the public school district(s) in which the public library is located. [Section 43.54, Wis. Stats.]

2. The library board supervises the administration of the library, appoints an administrator who is eligible for the appropriate grade level of public librarian certification from the Department of Public Instruction, and prescribes duties and compensation. [Section 43.58, Wis. Stats.]

3. The library board has exclusive control of the expenditure of all moneys collected, donated, or appropriated for the library fund. [Section 43.45(1), Wis. Stats.]

4. Public libraries are free for the use of the inhabitants of the municipality by which they are established and maintained and for the use of the residents of the public library system in which the library is located. [Sections 43.52(2), 43.15(4)(c), Wis. Stats.]

Only counties and municipalities may establish public libraries. For this purpose, "municipality" means a city, village, town, tribal government or tribal association, or a school district that maintained and operated a public library facility prior to December 17, 1971. [Section 43.01, Wis. Stats.]

A public library must also be established in accordance with Chapter 43 in order to participate in a state-funded public library system as a public library member and to benefit from federal Library Services and Construction Act funds. [Section 43.15(4)(c)(4), Wis. Stats.]

Intergovernmental Cooperation

Section 66.30, Wis. Stats., provides the foundation for intergovernmental cooperation in Wisconsin. S. 66.30(2) states:

> In addition to the provisions of any other statutes specifically authorizing cooperation between municipalities, unless such statutes specifically exclude action under this section, any municipality may contract with other municipalities and with federally recognized Indian tribes and bands in this state, for the receipt or furnishing of services or the joint exercise of any power or duty required or authorized by law. If municipal or tribal parties to a contract have varying powers or duties under the law, each may act under the contract to the extent of its lawful powers and duties. This section shall be interpreted liberally in favor of cooperative action between municipalities and between municipalities and Indian tribes and bands in this state.

In this section, "municipality" means the state or any department or agency thereof, or any city, village, town, county, school district, public library system, or public inland lake protection and rehabilitation district.

School districts, cities, villages, towns, public library systems, and counties but not public libraries are covered under s. 66.30. A public library board cannot enter into a s. 66.30 agreement on its own.

Public library boards may contract with library organizations within this state and in adjacent states to provide or receive library services [ss. 43.52(4), 43.57(1)(d), and 43.57(3)]. Since school districts provide extensive library services, they can be considered library organizations under the meaning of ss. 43.52(4), 43.57(1)(d), and 43.57(3).

A public library may operate a school library media center if certain conditions are met, including a proper agreement with the school district and compliance with standard "h" [PI 8.01(2)(h)].

Appendix E: Sample Master Agreement for a Combined School and Public Library

Note: All language in italics is intended to be explanatory and should not be included in the actual agreement.

Disclaimer: Any agreement developed for a combined school and public library should be reviewed by legal counsel of the parties involved. In general, this sample agreement is based on a scenario in which the combined library is located in a school facility. If the combined library is to be located in a municipal facility, the agreement would vary accordingly. If the public library component of the combined library is a branch of a larger public library unit, modifications would also be necessary.

Legal Basis

Include language related to the legal basis for the parties involved to enter an agreement.

This Agreement made and entered into on October 20, 1997, by the Village of Brown, a Wisconsin municipality (hereinafter "the Village"), the School District of Green, a political subdivision of the State of Wisconsin (hereinafter "the District"), and the Blue Public Library Board, a public library board established under Chapter 43, Wis. Stats. (hereinafter "the Library Board").

WHEREAS, the Village and the School District are legally authorized to enter into intergovernmental agreements for services or for the exercise of joint or common powers, pursuant to Section 66.30, Wis. Stats.;

WHEREAS, the Library Board may contract with library organizations to provide or receive library services, pursuant to Section 43.52 (4), Wis. Stats.; *[Note: Since the school district provides school library services, it is considered a library organization for the purpose of s. 43.52 (4)]*

WHEREAS, the Library Board has exclusive control of the expenditure of all moneys collected, donated, or appropriated for the library as well as exclusive charge, control and custody of all lands, buildings, money or other property acquired or leased by the municipality for library purposes, pursuant to Section 43.58 (1), Wis. Stats.;

NOW, THEREFORE, in consideration of the mutual promises contained in this Agreement and other good and valuable considerations, the parties agree as follows:

Governance and Policies

School district boards and public library boards cannot delegate statutory powers to another entity. Language to this effect should be included in the agreement.

Nothing contained herein shall be construed to limit the powers and duties of the District Board or the Library Board or to delegate such powers and duties as granted to them by Wisconsin law.

All policies of the combined library shall be approved by both the District Board and the Library Board. Policies may be modified at any time with mutual approval of both boards.

It may be beneficial to establish a Combined Library Advisory Committee to serve as an intermediary between the combined library and the District Board and the Library Board.

A Combined Library Advisory Committee shall be established which shall be responsible for developing and recommending policies for the combined library, and for establishing procedures for the library. The committee shall be comprised of [*insert number*] District Board members, [*insert number*] Library Board members, the school library media specialist, the public librarian, and the school principal.

Staffing

Include language which spells out how the combined library will be staffed and supervised. If the combined library is located in a school facility and separate staffing is to be provided by the school board and the library board, the following language could be used.

The parties will be responsible for providing staffing for the operation and maintenance of the combined library as follows:

The Library Board shall provide a public librarian certified by the Wisconsin Department of Public Instruction and such other staff as necessary to perform the public library mission of the combined library.

The District shall provide a school library media specialist certified by the Department of Public Instruction and such other staff as necessary to perform the school library media center mission of the combined library.

The Library Board shall provide overall supervision and evaluation of the public librarian. *Note: The school principal could provide coordination of staffing activities on a daily basis under policies adopted by the public library board.*

The school principal shall provide supervision of the school library media specialist.

Funding

Include language which spells out how the combined library will be funded. It is essential that funding coming from the municipality be identifiable in order for the municipality to meet its legal obligations for public library funding.

The Village and Library Board agree to pay the District [*amount to be determined by parties*] each year for space in the school, maintenance of the facility, utilities, and custodial services.

In the event additional space is needed or the existing space needs to be renovated, the parties shall mutually agree on how costs are to be allocated or recovered.

The District shall be responsible for the purchase of all materials selected by the school library media specialist and all processing costs related to these materials.

The Library Board shall be responsible for the purchase of all materials selected by the public librarian and all processing costs related to these materials.

The District and Library Board may jointly purchase some library materials, software, software licenses, and Internet access if mutually agreed to by the parties.

The parties shall mutually agree on how costs for existing and new technology are to be allocated or recovered.

The District shall be responsible for salaries and fringe benefits of all school personnel.

The Village and the Library Board shall be responsible for salaries and fringe benefits of all public library personnel.

Ownership of assets

Include language in the agreement which indicates ownership of assets at the time of the establishment of the combined library, ownership of assets acquired during the agreement, and ownership of assets if the agreement should be terminated.

Ownership of all library materials, equipment, and furnishings provided or purchased by the Library Board shall be retained by the Library Board and shall be identified as such.

Ownership of all library materials, equipment, and furnishings provided or purchased by the School District shall be retained by the School District and shall be identified as such.

All library materials, equipment, and furnishings shall be available for use by the public, the students, and school personnel. Public use of certain equipment owned by the School District may be restricted when it is in use by students and school personnel.

In the event of termination of this agreement, all library materials, equipment, and furnishings shall be divided in accordance with the ownership of the items.

Term, Termination, and Review of the Agreement

Include language which indicates the term of the agreement and basis for termination and review.

The term of this Agreement shall be for five years [*or other*] unless terminated by either party. The Agreement may be terminated by either party for cause, or for any or no reason upon giving eighteen months notice [*or other*]. The Agreement may be extended upon mutual agreement of the parties.

The parties agree to evaluate the effectiveness of the arrangement three years after the start of this agreement.

The Agreement may be modified at any time with mutual agreement of the parties.

Signatures to the Agreement

IN WITNESS WHEREOF, the parties have executed this Agreement by signing their names on this day and date first written above.

ATTESTED TO

By: _____
School District Board President

By: _____
Public Library Board President

By: _____
Village President